

Paying Your Municipal Tax Assessment

User Documentation



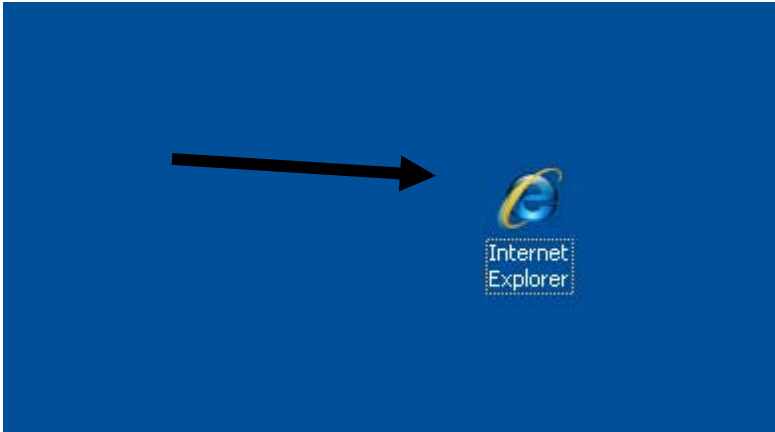
Kentucky Department of Insurance
October 2008
User Documentation
Version 1.0

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STARTING THE APPLICATION/ESERVICES


1. To begin the E-Services application, double click on the **Explorer icon** on your desktop. The icon is shown below.



External users should proceed to the Kentucky DOI Web page at:

<http://doi.ppr.ky.gov/kentucky/>

2. After clicking into the above Web site, the following page should appear:

KYDepartment of Insurance An agency within the Public Protection Cabinet		 Click here
Location: 215 W. Main St. Frankfort, Kentucky 40601 Mailing Address Information Directions (800) 595-6053 TTY (800) 462-2081		
CONSUMER PROTECTION & EDUCATION <ul style="list-style-type: none"> ▶ Free Publications ▶ Insurance Consumer Page ▶ Complaint Ratio Search ▶ File a formal complaint online ▶ "Clean Claims" Form ▶ Publicaciones en Español. ▶ Filing a consumer complaint [form & instructions] ▶ Event Calendar 	<p>Our Mission Statement: We promote sound, competitive insurance markets; protect the public through effective enforcement and regulation; and empower the public through outreach and education.</p> <p align="center">INFORMATION Search</p> <div style="border: 1px solid #ccc; padding: 5px;"> Select Search Option ▼ </div> <hr/> <p align="center">What's New</p> <ul style="list-style-type: none"> • Insurance Legislation Adopted by the 2008 Kentucky General Assembly (Regular Session). (08/08/2008) • Texas DOI Press Release: Lincoln Memorial Action. (07/31/2008) • Whitley City Woman Charged With Fraud. (07/31/2008) • Georgetown Man Charged With Insurance Fraud. (07/31/2008) • Military Sales Practices: Reporting of Disciplinary Actions. (07/21/2008) • Louisville Business Owner Indicted By Grand Jury.. (07/17/2008). 	
AGENT LICENSING <ul style="list-style-type: none"> ▶ Licensee Procedures, Forms and Information ▶ Agent/Agency Search ▶ eServices - Online Services / Information (Password Required) ▶ Insurance Licensee Page ▶ CE & Pre-licensing Providers, Courses, and Failure to Comply with CE 		
COMPANY INFORMATION <ul style="list-style-type: none"> ▶ Search for a Company ▶ Insurance Company Page ▶ Rate and Form Filings ▶ Financial Standards and Examination ▶ Local Government Premium Tax ▶ Annual Statement Filing Checklists and Instructions ▶ Captive Insurance Company Licensing and Regulation 		
ICARE <ul style="list-style-type: none"> ▶ Salary calculation/employees ▶ Application ▶ Application instructions ▶ Application tips ▶ Fact sheet 		


3. Click the E-Services icon in the top right corner of the Web page.



4. Which will direct you to the DOI e-services portal, as shown below.

KYDepartment of Insurance

[KYOI Home](#) |
 [FAQs](#) |
 [Contact Us](#)



Please log in here:


Username

Password

First time here? Please click here to register for secure access.

Forgot your password?

Having trouble logging in?
Click here for assistance.



[Click Here](#) to learn about our security.

What does eServices offer?

- Consumers**
 - Submit Consumer Complaint File
 - View data related to ratios (i.e., Complaint, Medicare Supplement, Consumer Guides) - **
 - Find information related to a licensed Insurer, Individual or Business Entity - **
- New Applicants** - **
(Paperwork not submitted yet)
 - Access to applications, study guides, instructions and documents
- Individuals**
(Licensed or pending applicants)
 - Review your licensing information and account profile
- Business Entities**
 - Review your affiliated individuals licensing information (i.e., addresses, examinations, license/application status, continuing education, etc.)
 - Submit requests for additional licenses, clearance / certification letters, voluntary surrenders, address changes, name changes, license renewals, and designations. **
- Insurers**
 - Review your affiliated individuals licensing information (i.e., addresses, examinations, license/application status, continuing education, etc.)
 - Renew appointments and submit payments
(Instructions) - New
Submit financial responsibility requests.

SETTING UP A NEW ACCOUNT

Before using E-Services, you'll need a username and password. **If you already have a username and password, skip to the next section.** If not, you'll need to create one. To do so, click "First Time Here."

KY Department of Insurance

Please log in here:

Username

Password

[First time here? Please click here to register for secure access.](#)

[Forgot your password?](#)

[Having trouble](#)

What

Consumers

- Submit Consum
- View data relat
- Complaint, Mec
- Consumer Guid
- Find information
- Insurer, Individu

New Applicants - **

This will enable the user to set up the account to gain access to the application.

KYOffice of Insurance

Create New eServices User Account :

Your eServices Account Information			
Username	<input type="text"/>		
Password	<input type="password"/>		
Verify Password	<input type="password"/>		
UserType	Individual: Individual Access <input type="button" value="v"/>		
Security Question	Your Mother's Maiden Name <input type="button" value="v"/>		
Answer	<input type="text"/>		

Your Contact Information			
First Name	<input type="text"/>	Middle Name/Initial	<input type="text"/>
Suffix Name	<input type="text"/>	SSN	<input type="text"/>
Telephone	<input type="text"/>	Extension	<input type="text"/>
E-mail Address	<input type="text"/>		

Your Mailing/Shipping Information			
Address Line 1	<input type="text"/>		
Address Line 2	<input type="text"/>		
City	<input type="text"/>	State	Select <input type="button" value="v"/>
		Zip	<input type="text"/>

For Surplus Lines Brokers

You'll need to designate your username and password....

Username
Enter your username. It must be between 8-15 alpha numeric characters in length

Your eServices Account Information

Username	<input type="text"/>
Password	<input type="password"/>
Verify Password	<input type="password"/>
UserType	Individual: Individual Access
Security Question	Your Mother's Maiden Name
Answer	<input type="text"/>

Username
Enter your username. It must be between 8-15 alpha numeric characters in length

Password
Enter a password that is between 8 to 15 alpha numeric characters. **Your password must contain at least 1 number.**

Your eServices Account Information

Username	<input type="text"/>
Password	<input type="password"/>
Verify Password	<input type="password"/>
UserType	Individual: Individual Access
Security Question	Individual: Individual Access
Answer	<input type="text"/>

User Type
Select the type of user account that you need to create on our system

Select the User Type:
Individual: Individual Access

Your Contact Information

First Name	<input type="text"/>
Suffix Name	<input type="text"/>
Telephone	<input type="text"/>
E-mail Address	<input type="text"/>

Select a Security question with answer...

Your eServices Account Information

Username

Password

Verify Password

UserType

Security Question

Answer

Your Contact Information

First Name

Suffix Name

Telephone

E-mail Address

Middle Name/Initial

SSN

Extension

Last Name

Your Mailing/Shipping Information

Address Line1

Address Line2

City

State

Zip

[Create Account](#)

Security Question
Select a question that will be easy for you to remember the answer to. This will be used to retrieve your password should you forget it.

Here...

Note the help as you select a data entry field...

You are now ready to enter your personal data.

Your Contact Information

First Name

Suffix Name

Telephone

E-mail Address

Middle Name/Initial

SSN

Extension

Your Mailing/Shipping Information

Address Line1

Address Line2

City

State

Zip

[Create Account](#)

You must enter your SSN to verify licensing status.

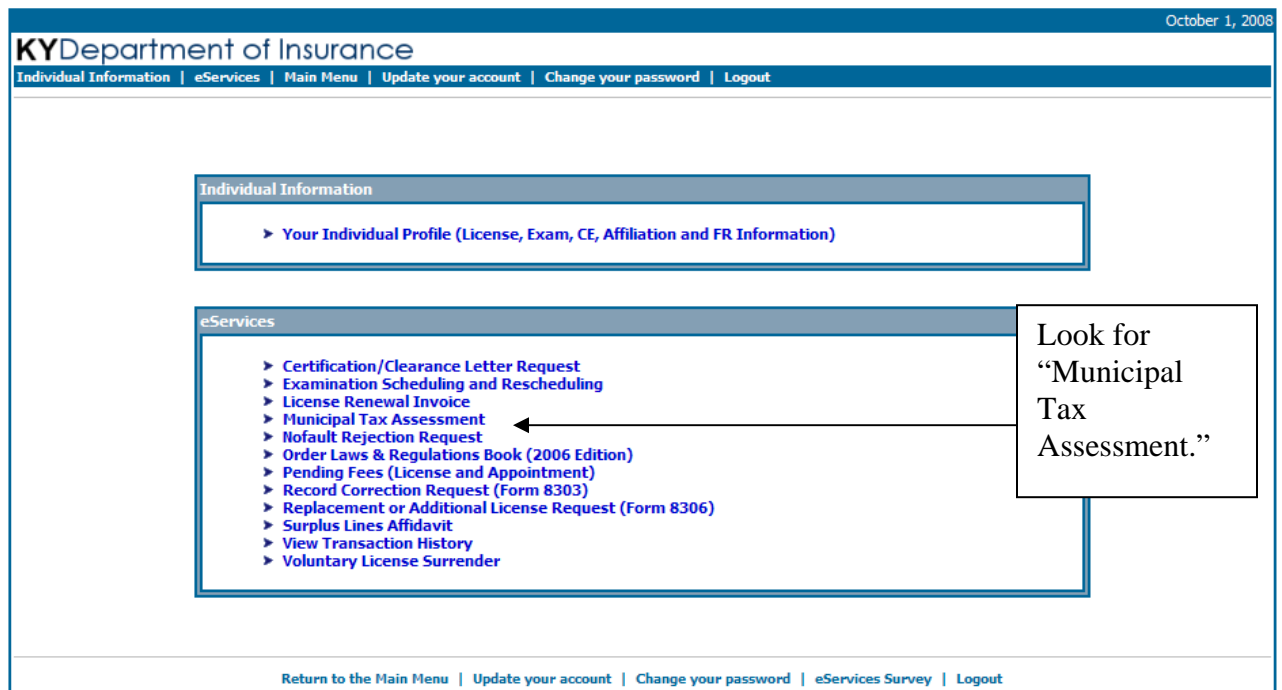
Note: the City/State/ZIP must be a valid USPS match.

Once finished, click "Create Account."

You're now ready to use KOI E-Services.

IMPORTANT: If nothing happens after clicking “Create Account,” please scroll to the top of the form to see if there are editing errors to consider.

After clicking “Create Account,” you should be taken to the following screen.



For Companies

To pay the assessment, the Companies will need to utilize their Annual Statement E-Services account. A mass e-mail was sent to all of these type contacts within your company including the username and password. If you did not get, or cannot find your username and password, please contact the Department via e-mail at:

KOISHelpDesk@ky.gov

ENTERING E-SERVICES WITH YOUR USERNAME AND PASSWORD

To enter the E-Services application, after you have already established your username and password, enter your username and password in the following fields from the E-Services portal previously shown in the documentation.

The image shows a screenshot of the KY Department of Insurance E-Services login page. The page has a header with the text "KY Department of Insurance". Below the header, there is a login form with the title "Please log in here:". The form contains two input fields: "Username" and "Password", followed by a "submit" button. An arrow points from the "submit" button in the original form to a callout box that says "Then click 'Submit.'". Another arrow points from the "Username" field in the original form to a callout box that shows the username "testing22" entered in the field. Below the login form, there are links for "First time here? Please click here to register for secure access." and "Forgot your password?". At the bottom, there is a link for "Having trouble" with a small icon.

KY Department of Insurance

Please log in here:

Username

Password

[First time here? Please click here to register for secure access.](#)

[Forgot your password?](#)

[Having trouble](#)

Co

view data relat

Complaint, Mec

Consumer Guid

New A

Then click "Submit."

The following screen should display...

The screenshot displays the KY Department of Insurance website interface. At the top right, the date "October 1, 2008" is shown. The main header includes the "KY Department of Insurance" logo and a navigation bar with links: "Individual Information", "eServices", "Main Menu", "Update your account", "Change your password", and "Logout".

Below the header, there are two primary sections:

- Individual Information**: Contains a link for "Your Individual Profile (License, Exam, CE, Affiliation and FR Information)".
- eServices**: A list of services including:
 - Certification/Clearance Letter Request
 - Examination Scheduling and Rescheduling
 - License Renewal Invoice
 - Municipal Tax Assessment** (highlighted with a black arrow)
 - Nofault Rejection Request
 - Order Laws & Regulations Book (2006 Edition)
 - Pending Fees (License and Appointment)
 - Record Correction Request (Form 8303)
 - Replacement or Additional License Request (Form 8306)
 - Surplus Lines Affidavit
 - View Transaction History
 - Voluntary License Surrender

A callout box on the right side of the eServices list contains the text: "Look for 'Municipal Tax Assessment.'".

At the bottom of the page, a footer bar contains links: "Return to the Main Menu", "Update your account", "Change your password", "eServices Survey", and "Logout".

PAYING THE ASSESSMENT

Click “Municipal Tax Assessment.”

October 1, 2008

KYDepartment of Insurance

[Individual Information](#) | [eServices](#) | [Main Menu](#) | [Update your account](#) | [Change your password](#) | [Logout](#)

Individual Information

► [Your Individual Profile \(License, Exam, CE, Affiliation and FR Information\)](#)

eServices

- [Certification/Clearance Letter Request](#)
- [Examination Scheduling and Rescheduling](#)
- [License Renewal Invoice](#)
- [Municipal Tax Assessment](#)
- [Nofault Rejection Request](#)
- [Order Laws & Regulations Book \(2006 Edition\)](#)
- [Pending Fees \(License and Appointment\)](#)
- [Record Correction Request \(Form 8303\)](#)
- [Replacement or Additional License Request \(Form 8306\)](#)
- [Surplus Lines Affidavit](#)
- [View Transaction History](#)
- [Voluntary License Surrender](#)

[Return to the Main Menu](#) | [Update your account](#) | [Change your password](#) | [eServices Survey](#) | [Logout](#)

Select the box next to the broker's name, and click “Submit.”

October 1, 2008

KYDepartment of Insurance

[Individual Information](#) | [eServices](#) | [Main Menu](#) | [Update your account](#) | [Change your password](#) | [Logout](#)

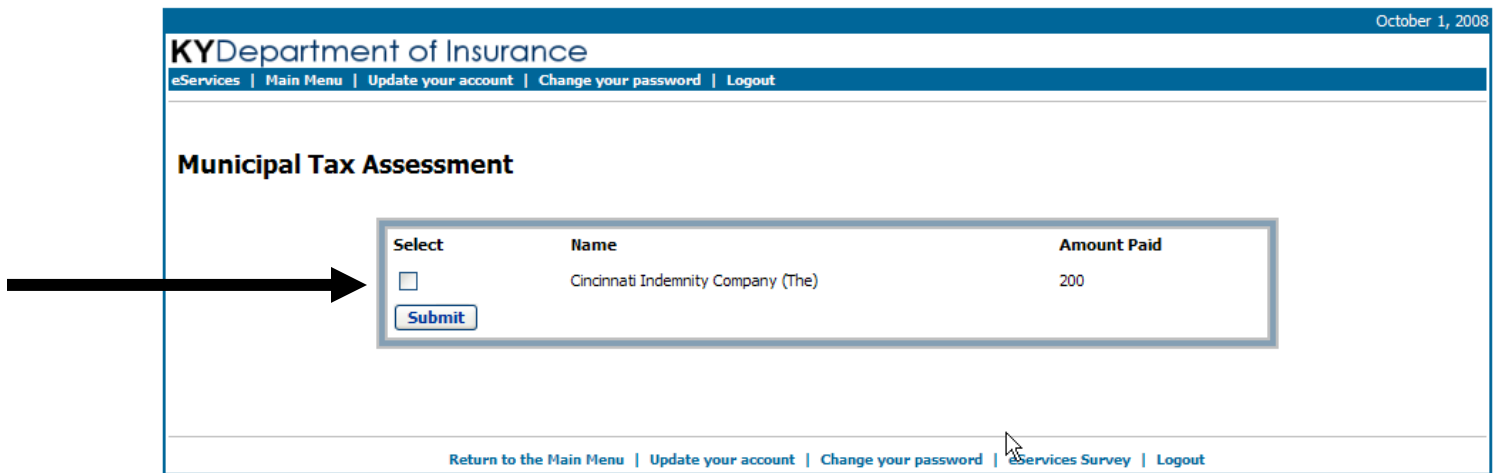
Municipal Tax Assessment

Select	Name	Amount Paid
<input type="checkbox"/>	Doe John	50

[Submit](#)

[Return to the Main Menu](#) | [Update your account](#) | [Change your password](#) | [eServices Survey](#) | [Logout](#)

Or, if this is a company payment, select the company name in the same manner...



October 1, 2008

KY Department of Insurance

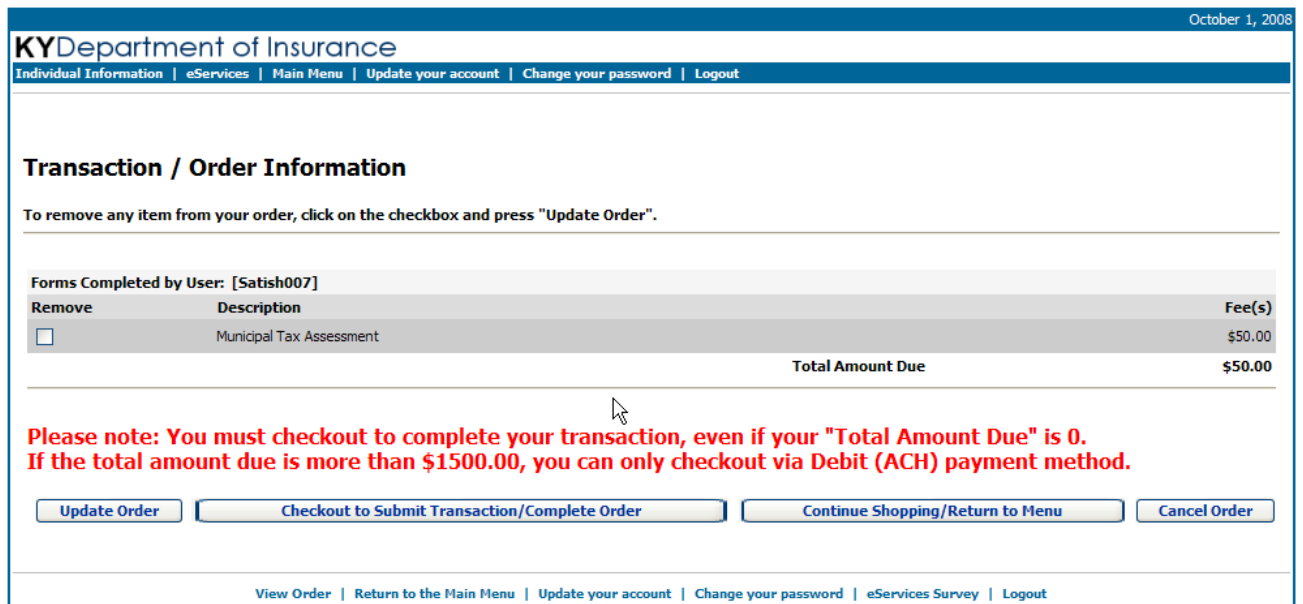
eServices | Main Menu | Update your account | Change your password | Logout

Municipal Tax Assessment

Select	Name	Amount Paid
<input type="checkbox"/>	Cincinnati Indemnity Company (The)	200

Return to the Main Menu | Update your account | Change your password | eServices Survey | Logout

After the broker clicks "Submit," the following screen will display..



October 1, 2008

KY Department of Insurance

Individual Information | eServices | Main Menu | Update your account | Change your password | Logout

Transaction / Order Information

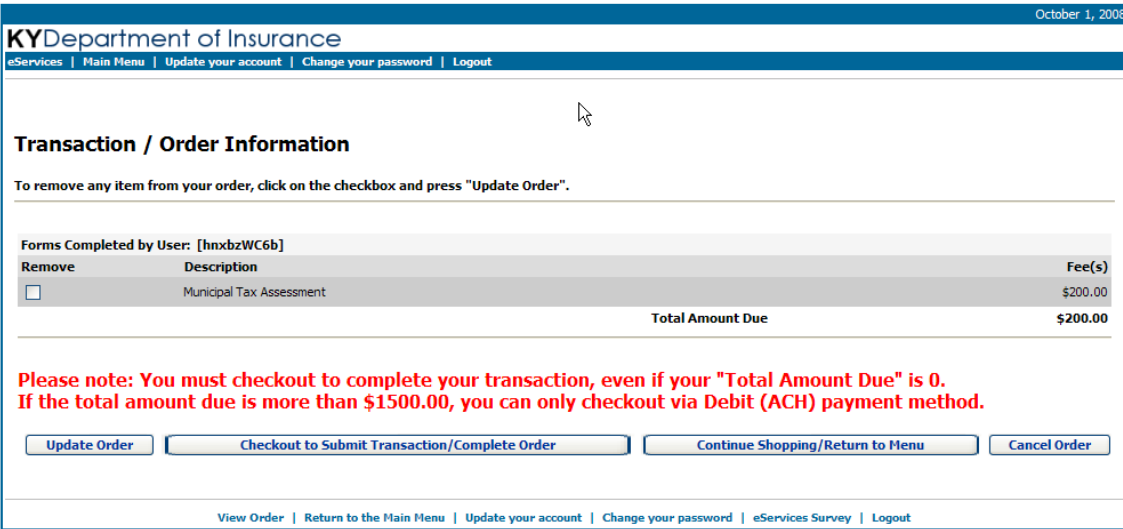
To remove any item from your order, click on the checkbox and press "Update Order".

Forms Completed by User: [Satish007]		
Remove	Description	Fee(s)
<input type="checkbox"/>	Municipal Tax Assessment	\$50.00
Total Amount Due		\$50.00

Please note: You must checkout to complete your transaction, even if your "Total Amount Due" is 0. If the total amount due is more than \$1500.00, you can only checkout via Debit (ACH) payment method.

View Order | Return to the Main Menu | Update your account | Change your password | eServices Survey | Logout

Or the company...



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KYDepartment of Insurance

[eServices](#) | [Main Menu](#) | [Update your account](#) | [Change your password](#) | [Logout](#)

Transaction / Order Information

To remove any item from your order, click on the checkbox and press "Update Order".

Forms Completed by User: [hnxbzWC6b]		
Remove	Description	Fee(s)
<input type="checkbox"/>	Municipal Tax Assessment	\$200.00
Total Amount Due		\$200.00

**Please note: You must checkout to complete your transaction, even if your "Total Amount Due" is 0.
If the total amount due is more than \$1500.00, you can only checkout via Debit (ACH) payment method.**

[Update Order](#) [Checkout to Submit Transaction/Complete Order](#) [Continue Shopping/Return to Menu](#) [Cancel Order](#)

[View Order](#) | [Return to the Main Menu](#) | [Update your account](#) | [Change your password](#) | [eServices Survey](#) | [Logout](#)

Click “Checkout to Submit Transaction/Complete Order” to finalize the transaction.

You will either need to pay via Credit Card...

Checkout

You may enter either your credit card information OR your checking account information to process your order.

Total amount to be billed to your credit card: \$50.00

Credit Card Information

Enter your billing information EXACTLY as it appears on your credit card and/or billing statement

Card Type: ☐ Visa ☐ MasterCard ☐ Discover ☐ American Express

Card Number:

Expiration Date: /

Name on Card:

Billing Zip/Postal Code:

Phone Number:(Number Only)

----- OR -----

Enter your
credit card
information
here...

Or via Debit...

----- OR -----

Debit Information

Enter your checking account information exactly as it appears on your check

Name on Account:

Pay to the Order of Kentucky Office Of Insurance Dollars

Memo

⑆021001088⑆ 00112221234

Enter the
Checking
Account
Name here.

Routing Number

This number is nine characters long and appears between the ⑆ symbols usually at the bottom left corner of your check.

Account Number

This number is 5-17 characters long and appears next to the ⑆ symbol at the bottom of your check and usually to the right of your bank routing number.

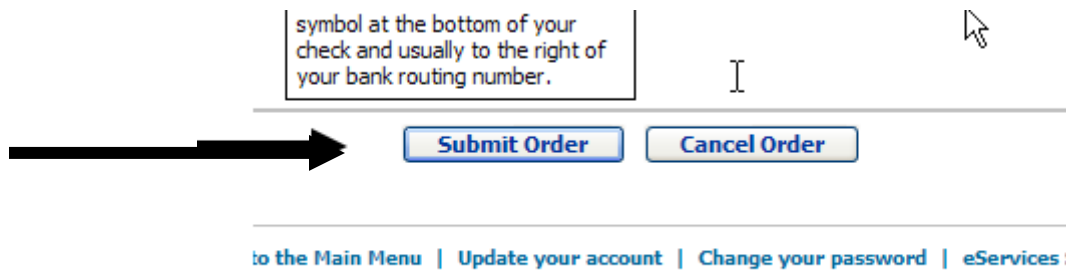
Then the routing
number, along with
the account number
here...

[Submit Order](#)

[Cancel Order](#)

[View Order](#) | [Return to the Main Menu](#) | [Update your account](#) | [Change your password](#) | [eServices Survey](#) | [Logout](#)

After completing either, click “Submit Order” to proceed.



You will get a final transaction screen to show the completion of your order....

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KY Department of Insurance

[Individual Information](#) | [eServices](#) | [Main Menu](#) | [Update your account](#) | [Change your password](#) | [Logout](#)

Transaction Details

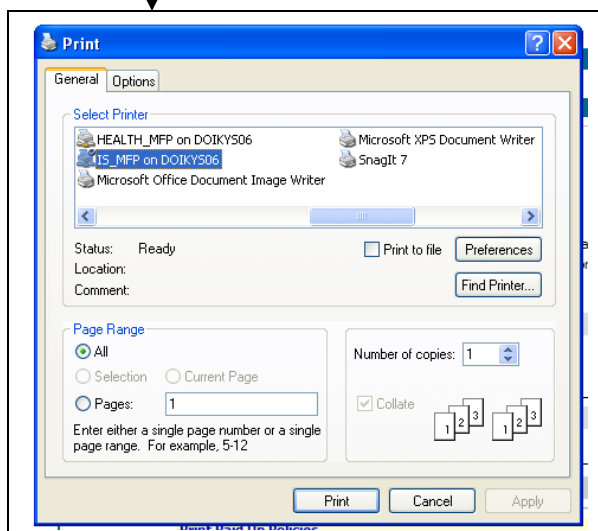
Entity / User Details		
DOI Number	Individual / Entity Name	
User Last Name	User Middle Name	User First Name
		Robert

Transaction Status: Complete

Order Information		Shipping Information (if applicable)
DOI Transaction ID: 13		
ePay Transaction ID: 457		
Transaction Date: 10/01/2008		

Qty	Description	Fee(s)
1	Municipal Tax Assessment	\$50.00
Total Charged:		\$50.00

[Print copy of invoice](#) | [Click here to return to the main menu](#)



You can also print a copy of your invoice...

You have now completed the payment of the assessment.

October 1, 2008

KYDepartment of Insurance

Individual Information | eServices | Main Menu | Update your account | Change your password | Logout

Transaction Details

Entity / User Details

DOI Number

User Last Name

Click here...to log out of
your E-Services session.

User First Name

Robert

Transaction Status: Complete

Order Information

Shipping Information (if applicable)

DOI Transaction ID: 13
ePay Transaction ID: 457
Transaction Date: 10/01/2008

Qty	Description	Fee(s)
1	Municipal Tax Assessment	\$50.00
Total Charged:		\$50.00

[Print copy of invoice](#) | [Click here to return to the main menu](#)

VIEWING TRANSACTION HISTORY

You may return to the application to review previously completed transactions.

To do so, enter the E-Services application as described previously....

First, log into E-Services...

KYDepartment of Insurance

Please log in here:

Username

Password

[First time here? Please click here to register for secure access.](#)

[Forgot your password?](#)

Having trouble 

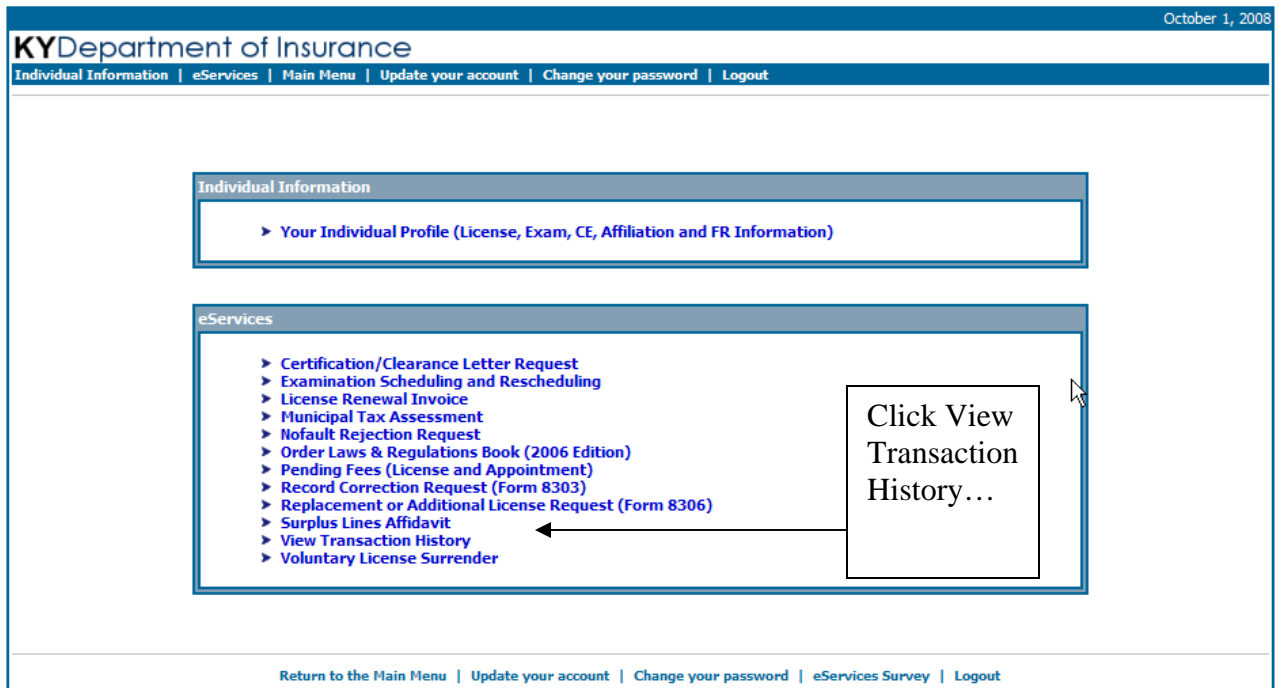
Please log in here:

Username

Password

Then click
"Submit."

The following screen should display...




Transaction History

Entity / User Details

DOI Number	Individual / Entity Name	
User Last Name	User Middle Name	User First Name

The last 30 days of transactions will automatically display

To view 30 days of transactions during a certain period, Enter the start date.

Enter Start Date  [Display Transactions](#)

Below is a list of all your transactions within the last 30 days. You must re-submit any transactions that are listed as incomplete.

Transaction ID	ePay Trans ID	Transaction Date	Transaction Total	Transaction Status
139	45	10/01/2008	50	Complete

Click on the Transaction ID to view the details of the Transaction.

You can also search further back than this, by utilizing the tool shown here.

The screenshot shows the 'Transaction History' page of the KY Department of Insurance. The page header includes 'eServices | Main Menu | Update your account | Change your password | Logout'. The 'Entity / User Details' section shows 'DOI Number 300363' and 'User Last Name doe'. The 'Individual / Entity Name' section shows 'User Middle Name e'. Below this, a text prompt reads: 'To view 30 days of transactions during a certain period, Enter the start date.' There is an 'Enter Start Date' text box with a calendar icon to its right, and a 'Display Transactions' button. A calendar pop-up window titled 'Calendar - Windows Int...' is open, showing 'August 2008' with the 11th highlighted. Three callout boxes provide instructions: 'Click here..' points to the calendar icon; 'After the date has been set, click "Display Transactions" to list the result in the grid, as shown below.' points to the button; and 'To display the calendar. This will allow you to enter a new begin date to search by, which will set the search parameter from the begin date, to current.' points to the calendar window.


KY Department of Insurance
eServices | Main Menu | Update your account | Change your password | Logout

Transaction History

Entity / User Details

DOI Number	Individual / Entity Name
300363	
User Last Name	User Middle Name
doe	e

To view 30 days of transactions during a certain period, Enter the start date.

Enter Start Date 

Click here..

To display the calendar. This will allow you to enter a new begin date to search by, which will set the search parameter from the begin date, to current.

After the date has been set, click "Display Transactions" to list the result in the grid, as shown below.

To review a record displayed in the grid, click the Transaction ID.

Below is a list of all your transactions within the last 30 da

Transaction ID	ePay Trans ID
22667	
22668	

Click on

Which will display the following screen.

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KY Department of Insurance


Individual Information | eServices | Main Menu | Update your account | Change your password | Logout

Transaction History

Entity / User Details

DOI Number	Individual / Entity Name	
User Last Name	User Middle Name	User First Name

To view 30 days of transactions during a certain period, Enter the start date.

Enter Start Date 

Below is a list of all your transactions within the last 30 days. You must re-submit any transactions that are listed as incomplete.

Transaction ID	ePay Trans ID	Transaction Date	Transaction Total	Transaction Status
135	45	10/01/2008	50	Complete

Click on the Transaction ID to view the details of the Transaction.

Return to the Main Menu | Update your account | Change your password | eServices Survey | Logout

Click the transaction ID

To display the details of the transaction.

Individual Information | eServices | Main Menu | Update your account | Change your password | Logout

Transaction Details

Entity / User Details		
DOI Number	Individual / Entity Name	
User Last Name	User Middle Name	User First Name

Transaction Status: Complete

Order Information	Shipping Information (if applicable)
DOI Transaction ID: 1: ePay Transaction ID: 45 Transaction Date: 10/01/2008	

Qty	Description	Fee(s)
1	Municipal Tax Assessment	\$50.00
Total Charged:		\$50.00

[Print copy of invoice](#) | [Click here to return to the main menu](#)

Return to the Main Menu | Update your account | Change your password | eServices Survey | Logout

Log out of
the system
here.